

<<Printing this document in color will make it easier to read>>



Application Instructions and WebGrants Tutorial FY2014-15 Operating Grant

* Keep this document and the OpG Guidelines with you as you complete the application. *

QUICK REFERENCE CONTENTS

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OVERALL REMINDERS

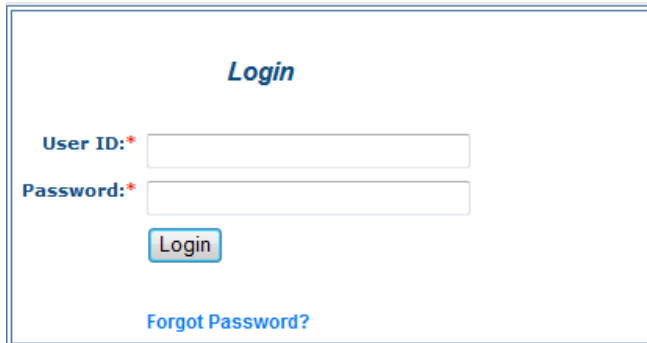
1. **Your session will time out after 30 minutes of inactivity.** There is no prior warning so please remember to save your work frequently by clicking the  icon .
2. **Save your work often!** WebGrants only saves your work when you click the  icon. If you go to another section without saving, you will lose the work you did.
3. **All required fields in a section must be saved prior to clicking the SAVE icon.** If you try to click the SAVE button and you get an error message: **“Please complete all required fields,”** this means that there is at least one required field (i.e., question) that you have not yet completed; required fields are marked by a red asterisk. **TIP:** If this you get this message, you can place a random character (like an “x” in each required field and then the system will allow you to save. **Make sure that you have replaced all placeholders with actual responses before submitting your application.**
4. **Cutting and pasting responses from a Word document.** Some applicants choose to compose their answers using Microsoft Word and then cut and paste their responses into WebGrants. After cutting and pasting, double check that the entire response has been transferred to WebGrants. **NOTE: WebGrants will cut off any responses after the maximum character count has been reached, and it will not let you know that any words have been cut off.**
5. **Formatting issues when cutting and pasting.** If you experience difficulties cutting and pasting from a Word document into WebGrants, try this method: 1) highlight and copy the section you want to paste, 2) put your cursor into the field and hit the space bar once, 3) click the icon in the red box below and follow the directions for pasting your text into the pop-up dialogue box and 4) click the green button labeled “Insert.”



For additional questions, email karen.park@sanjoseca.gov (faster) or call 408-793-4334. Response times will generally be quicker via email; please allow at least 2 business days.

1. **Starting Point**

Enter your user id and password into the City of San Jose's **login page**: <http://grants.sanjoseca.gov>



If you don't have a user id, you can request one by going to the same login page and clicking on the “Register Here” link below the City's icon. It will take about 2 business days to process.

If you forgot your password, click on the “Forgot Password?” link below the login button, and enter your user id and the email that you originally registered with. Your password will be sent to the email account in a few minutes.

If you forgot your user id, contact your arts program staff.

a. Click on Funding Opportunity link



Funding Opportunities

b. Click on Operating Grant FY2014-15 link under the Opportunity Title label



c. Click on “Start A New Application” – DO NOT CLICK “Copy Existing Application”

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save

Funding Opportunities

Current Applications

Any previously created applications, for this opportunity, appear below. To start a new application for this opportunity, Click the Start a New Application link or to copy data from an old application, click on the Copy Existing Application link.

ID	Application Title	Status
After Step #2, your application will appear here:		
No existing applications		

Opportunity Details

17685-Operating Grant FY2014-15

[Copy Existing Application](#) [Start a New Application](#) [Ask A Question](#)

NOTE: After you start a new application, the next time you log into the system, your Project Title should appear under the "Application Title" column and you can click on that each time to continue working on your application.

If you will have several people working on the application, make sure that people do not create a new application every time they enter the system; have everyone work on the one application that is initially created in this step.

For future reference, in order to return to an application that you already created, log on to the system; do steps #1-3. At the top of the screen you will see your Project Title (the one that you will create in Step #5). Click on your Project Title, and, then you can click on the application section that you want to return to.

2. **General Information**

Enter your Project Title (*Example: FY2014-15 Operating Grant – ABC Theater*) and select the proper drop down values for Primary Contact, Authorized Official and Organization then click

on  icon.

General Information

This page must be completed and saved before proceeding with t

Primary Contact:*

**Project Title:
(limited to 250 characters)**

Authorized Official:*

Organization:*

If satisfied with answers Click on Go to Application Forms link. If answers are unsatisfactory click on the Edit link

[Go to Application Forms](#)

Or


 [Edit](#)

NOTE: After you complete this step, you will be able to preview and print the entire application by clicking on the APPLICATION DETAILS link. (Refer to image below.)


Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	11/08/2013	
Source of Funds Statement			
Cover Sheet			
Narrative			
Attachments			
Application Signature			


To see the full application at any time, click on the **APPLICATION DETAILS** link and you will be able to view and print it to PDF. Unfortunately, you can't select only certain sections to view, the whole application gets converted to a PDF.

3. **Sources of Funds Statement** After completing Step #5, click on **Sources of Funds Statement Application Form** link:

- (a) Scroll up and click on the  link to begin filling out this form.
- (b) Enter response(s) for **Project Description** (Example: “**Present a season of theater programs during FY2014-15**”) and **Grant Amount Requested** in the form.

*Note: The number you put into the **Grant Amount Requested** field has no bearing on your grant award and is not considered by the review panel in any way. (This info is asked only for City-wide data collection purposes.) Refer to Section 3.2 in the OpG Guidelines for how grant levels are determined in the OpG program. If you would like a very rough estimate of a potential grant based on past funding levels, you can utilize the **Reference Grant Calculator** on the OCA’s Operating Grant webpage.*

- (c) After you are done, click the  icon.

If you are unable to click into the fields, or if you are returning to the document to edit previous info, then scroll up and click on the  icon, and the fields should be opened so you can enter or revise information.

- (d) In order to enter response(s) for **Total Amount of Other City Funds for Project** and **Total Amount of External Funds for this Project**, you must click on the highlighted blue **Add** link on the far right of the table.

- i.) Additional directions for **Total Amount of Other City Funds for the Project** box:

Total Amount of Other San Jose City Funds for Project			Add
Program/Agency	Fund Status	Use of Funds	Amount

If you have no Other City Funds for this project, you must click on the blue **Add** icon to the far right and then type in “n/a” in all the fields (Program/agency, Fund Status, Use of Funds); leave the Amount at “\$0.”

If you do anticipate other City funds (cash grants), click on the Add link and complete the required information. Repeat this step for each different City funding source that you are budgeting.

Later, if you want to change your responses in the tables click on the **highlighted blue text** in the Program/Agency column.)

ii.) Special instructions for **Total Amount of External Funds for this Project** for Operating grant applicants:

After you hit the **Add** icon, write in “Various” under PROGRAM/AGENCY and select “Anticipated Revenue” from the drop down menu for FUND STATUS and write in “Arts Programming” for USE OF FUNDS. For the AMOUNT, enter your **total projected revenues** for FY2014-15 minus a) your operating grant request and b) any other City grants that are you are budgeting.**

Example: If your organization budgeted total operating revenues of \$200,000, and you were requesting a \$20,000 Operating Grant and you budgeted a \$10,000 grant from another City department for an at-risk youth program, then you would put \$170,000 (\$200,000 - \$20,000 - \$10,000) on the AMOUNT line. When you are done, it should look something like this (Of course, your figure in the “amount” line will be different, however!):

Total Amount of External Funds for Project				Add
Program/Agency	Fund Status	Use of Funds	Amount	
Various	Anticipated Revenue	Arts Programming	\$170,000	

**NOTE: Non-arts organizations should use only their arts program budget in lieu of their total organization budget.

Later, if you want to change your response(s) in the tables click on the highlighted text in the Program/Agency column.

If you have only entered placeholder values in these fields it is suggested that you click the save button and then click on the Go to Application forms, which will allow you to exit the form and return later to enter correct values. If you are satisfied with responses, click on the Mark as Complete link.

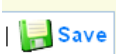
[Go to Application Forms](#)


Or

[Mark as Complete](#)

4. **Cover Sheet** After clicking on the Mark as Complete or Go to Application forms in Step #6, click on the **Cover Sheet** form.

Form Name
Cover Sheet

After entering your responses, click on the  icon.

If you are unable to click into the fields, or if you are returning to the document to edit previous info, then scroll up and click on the  icon, and the fields should be opened so you can enter or revise information.

If you have only entered placeholder values in these fields it is suggested that you click on the Save link and then click on the Go to Application forms, which will allow you to exit the form and return later to enter correct values. If you are satisfied with responses, click on the Mark as Complete link.

[Go to Application Forms](#)

Or

[Mark as Complete](#)

5. **Narrative** After clicking on the Mark as Complete or Go to Application forms in Step #7, click on the **Narrative** form. Complete this form by clicking directly into the field boxes to enter text.


Form Name
Narrative

After entering text, click on the  icon.

Please use 12 point font for the benefit of your application readers!

Note #1: WebGrants does not have a running character count function. Spaces and formatting code count as characters. If you feel if you are nearing the limit, you can hit the save button, and it will tell you whether you have exceeded the character limit, which counts spaces and formatting code. (Alternately, you can compose the answer in a Word document and determine the character count in Word. If you do this, note that that Word will generally undercount the characters because it may not count paragraph returns and formatting as characters and WebGrants does.)

*Note #2: If you are cutting and pasting from a word document, it's recommended that you **cut and paste the answers one question at a time**, and **HIT THE SAVE BUTTON AFTER EACH QUESTION**. For example, after you've cut and pasted the answer to one question, hit the save button, then cut and paste the answer to the second question.*

If you are unable to click into the fields, or if you are returning to the document to edit previous info, then scroll up and click on the  icon, and the fields should be opened so you can enter or revise information.

If you have only entered placeholder values in these fields, it is suggested that you click on the Save link and then click the Go to Application forms, which will allow you to exit the form and return later to enter correct values. If you are satisfied with responses click on the Mark as Complete link.

[Go to Application Forms](#)

Or

[Mark as Complete](#)

6. **Attachments** After clicking on the Mark as Complete or Go to Application Forms in Step # 8, click on the **Attachments** form.

All Attachments must be in PDF format. The only exceptions are:

Item #9a-c. Supporting Materials. Acceptable formats are: PDF, JPEG or Word document with a hyperlink.

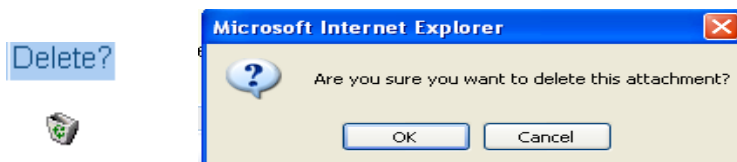
Item #10. Optional Work Sample. Acceptable formats are: Word document with a hyperlink to YouTube or Flickr or website; audio file (YouTube, MP3, or Flickr); video file (YouTube or Flickr); or Flickr Photo Gallery.

Complete this section by executing the directions below.

Form Name
Attachments

- Click on the highlighted text for each requested attachment;
- Click on the Browse button to select the requested file to attach;
- Enter text in the description field box;
- Click on the Save link; and
- Repeat these steps for each requested document.

If you need to remove an attached document, click on the delete link. Then OK on the drop down message box.




If you have only entered placeholder values in these fields it is suggested that you click on the **Save** button and click on the **Go to Application** forms, which will allow you to exit the form and return later to enter correct values. If you are satisfied with responses click on the **Mark as Complete** link.

Go to Application Forms Or **Mark as Complete**

7. **Application Signature Form** After clicking on Go to Applications or Mark as complete in Step #9, click on the **Application Signature** Form. This step should be done once you have completed answering all of the questions and filling in placeholders.

Form Name
Application Signature

Read the statement in the field and click on the **Application Signature** check box if you agree with the statement. Enter the date in the calendar field box. When done, click on the  **Save** icon.

If you are satisfied with your answers, click on the [Mark as Complete](#) link.

8. **Preview the application** To Preview the application, click on the [Application Details](#) icon and you will have the option to view what you have done so far and print to PDF if desired. You can actually click the [Application Details](#) link at any time in the process.
9. **Submit the Application** To submit the application, the COMPLETE column must have a check mark by each application component as shown in the image below:

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	11/08/2013	
Source of Funds Statement	✓	11/08/2013	
Cover Sheet	✓	11/08/2013	
Narrative	✓	11/08/2013	
Attachments	✓	11/08/2013	
Application Signature	✓	11/08/2013	

Click on the [Submit](#) icon and then on the OK button to complete the application. This will lock the application and no further editing will be allowed.

IMPORTANT NOTE: Prior to submitting, please be sure to preview the entire application (see above step) to make sure that you have responded to each question to your satisfaction, and that you double checked that all “place holder” responses (i.e., misc. characters that you placed in required fields so that you could save the application and return for future editing later) have been replaced with actual responses. After you submit the application, you will not be able to make any revisions or changes.

Once the Submit button has been successfully clicked, you should immediately see a confirmation message screen from WebGrants that the system has accepted your application.

Applicants bear the burden of proof that their application was submitted successfully. Applicants are strongly advised to print this confirmation screen as proof of their submission.

Sample Confirmation Screen is below. It's highly recommended that you print your confirmation screen for your records.



REMINDER: The application deadline is **5:00pm on Monday, February 3, 2014**. WebGrants will not accept applications submitted even a minute after the deadline so please plan to submit the application *at least 7 days prior* to the deadline so that you have time to resolve any unanticipated issues. **Also, Supporting Material(s) that are not uploaded in Attachments must be submitted by mail or delivered to the OCA on or before the same deadline.** (See Section 5.5 in OpG Guidelines)

Planning Tips for a Successful Application Submittal Experience

- GET STARTED EARLY. Set your personal deadline to submit the application at least one week prior to the posted deadline. You take a significant risk by waiting until the deadline to submit the application! WebGrants does not accept late applications.
- READ GRANT GUIDELINES THOROUGHLY BEFORE STARTING THE APPLICATION. The Guidelines contain important information you will need about the supporting materials (Section 5.5) and the preparation of attachments (Section 5.6 & 5.7). In addition, it is helpful to refer to evaluation criteria when writing the application narratives.
- LOCATE AND CONVERT REQUIRED ATTACHMENTS TO PDF FORMAT AS EARLY AS POSSIBLE. If you do not have in-house capacity, many large copy centers have services that will convert paper or electronic documents to PDF. Call in advance to locate a center and do this as soon as possible.
- If you are submitting an **optional work sample**, make sure you are familiar with the required formats: **Word document with a hyperlink to YouTube or Flickr or website; audio file (YouTube, MP3, or Flickr); video file (YouTube or Flickr); or Flickr Photo Gallery.**
- NEW: Select and convert **supporting materials** to the acceptable format as early as possible. Supporting Material(s) are now accepted as Attachments in WebGrants. Acceptable formats are: **PDF, JPEG and Word document with a hyperlink** to a webpage. If the conversion of your Supporting Material(s) to one of the acceptable formats degrades their viewing quality or is too labor-intensive, you may submit 2 hard copies of the Supporting Material(s) by the application deadline.